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## SUMMARY

Brussels (Zaventem) National airport is the only large international airport in Belgium and considered the main entrance point for both passengers and cargo. In 2000, 21 million passengers traveled through the airport and 687,000 tons of freight were handled at its cargo operation in 2000.

Traffic is expected to increase with the addition of new European Union (EU) and NATO member states as well as the growing role of Brussels as the EU's de facto capital. Currently, the passenger traffic growth to/from and via Brussels grows at a pace three times faster than the world average.

BIAC (Brussels International Airport Company) is continuously investing to meet growing traffic. Several new piers, of which one is near completion, are currently under construction or in a planning stage. In addition to the existing 52 gates, 60 new ones are planned for the next ten years. The first new pier will be ready by April 2002. Its 30 gates will be reserved for passengers to and from "Schengen countries"(\*). Security equipment must increase significantly to meet new requirements due to the addition of new Schengen-member countries, as well as the need to keep Schengen and non-Schengen passenger flows separate.

Belgian airports' attractiveness is further enhanced by their close – if not yet direct - links to the expanding high-speed railroad network (TGV), linking Brussels, Paris, London, Amsterdam and Cologne. Furthermore, TGV-connected airports will be at an even greater advantage when intermodal express shipping comes of age. Dedicated air/rail containers as well as high-speed all-cargo railcars already are on the drawing board.

There are also four regional airports in Belgium, vying for a share of the competition. They are located in Antwerp, Oostende, Charleroi and Liege.

(\*) "Schengen Counties" refer to the treaty signed in Schengen, Germany, by a number of EU member-states (France, Germany, BENELUX-countries, Spain, Austria, and Greece) and by which the signatories agree to create a border control-free area among them and to control people and goods only at the area's peripheral borders.

### **Regional Airports**

Regional airports thrive mainly on overflow traffic from Zaventem, dedicated cargo operations, charter and discount flights, and express courier services. The latter three airports mentioned below can accommodate Jumbo's, and are extending their runways to allow for full-load intercontinental flights. All three have good potential for growth.

#### Liege

This airport's activities are focused on freight operations, express courier services and charter flights. Freight operations increased by 30% over the last year. It formed a partnership with ADPM (Paris Airports Management).

Runway: 10,000 ft., soon to be extended to 11,100 ft.

Traffic in 2000: Passengers: 208,000

Freight: 270,000 tons

### Charleroi

This airport, renamed “Brussels South Charleroi Airport”, benefits from generous public funding and aims primarily at scheduled, discount flights.

Runway: 7,700 ft, soon to be extended to 10,500 ft.

Traffic in 2000: Passengers 250,000

Freight: marginal.

### Ostend.

This is a dedicated cargo airport offering 24-hour service. Its location a few hundred yards from the sea allows for full-throttle climbing, away from populated areas. For the time being, it is used extensively for Chapter 2 aircraft that are denied access to other airports.

Runway: 10,500 ft.

Traffic in 2000: Passengers 224,000

Freight: 94,000 tons

### Antwerp

Antwerp (Deurne) airport’s current activities as well as potential for expansion are limited due to its short runway and surrounding urban area. This airport is used mainly for general aviation purposes and some short-haul flights operated with regional aircraft

Runway: 4,500 ft.

Traffic in 2000 Passengers: 179,000

Freight: marginal

CS Brussels also coordinates USDOC activities in Luxembourg. American industry involved in airport services should not overlook Luxembourg because its economy is far bigger than the country’s small size may indicate. Findel, a thriving airport within 130 miles of Brussels, is currently expanding its passenger as well as its cargo handling capacity. Even though this country has only 400,000 inhabitants, and is roughly the size of Rhode Island, the country supports two vigorously growing airlines: Luxair, and Cargolux, its all-cargo carrier. The latter currently operates ten 747’s of the 400 series and now carries 274,000 tons annually. Cargolux ranks among the world’s top-five all-cargo carriers.

## **Air Traffic Control**

Eurocontrol is responsible for Belgian air traffic control operations above flight level 245 (24,500 feet). They are developing plans for the creation of a commonly accepted and supported long-term Air Traffic Management (ATM) strategy extending up to the year 2015. EATCHIP (European ATC Harmonization and Integration Program) is an on going process of updating and harmonizing the various air traffic control systems in Europe. Currently, the program is in its third phase, called “gate to gate.” Eurocontrol’s office is located in Brussels

Belgocontrol (formerly Regie des Voies Aeriennes/Regie der Luchtwegen - RVA/RLW) is a government agency which handles all air side airport operations and the procurement of air traffic control equipment for all Belgian airports. It is responsible for the air traffic control operations for all of Belgium below the Belgian airspace level 245.

## **Airport Operations**

Landside operations at the Zaventem Airport are run BIAC (Brussels International Airport Company), a mixed state owned/publicly owned company.

Handling companies. The following are the only handling companies operating at the Brussels Airport: Sabena, Aviapartner, Global Ground, and DHL.

Sabena and Aviapartner are the only two third party handling companies at the Brussels Airport.

Sabena Ground and Cargo Handling are both part of the Sabena Group. Ground Handling handles on average 19,000 passengers per day and 38,000 pieces of baggage. In 1999, there was 302,451 tons of cargo handled by the company.

Aviapartner Belgium has been granted the full ground-handling license for Brussels, Antwerp, Ostend and Liege airports. In 2000, the company handled over 28,900 flights, 3,420,000 passengers and more than 279,000 tons of cargo. They employ 1,500 people. Aviapartner has focused its business on the handling of passengers, cargo and mail, courier, aircraft, and on catering and maintenance services.

## **MARKET ACCESS**

Belgium is an open market. However, in the past it seems as though European companies have been enjoying a preference for airport matters, as evidenced by their success in winning bids. All the same, U.S. suppliers are well accepted and highly regarded for their advanced technology, especially in all fields related to aviation.

The Federal Aviation Administration (FAA) Brussels Office, which serves as headquarters for Europe, Africa and the Middle East, should be U.S. manufacturers' first contact when investigating the Belgian market. The FAA also functions as a highly respected advisor to the Belgian civil aviation authorities

Numerous foreign companies, of which 1400 are American, are doing business in Belgium, either through wholly owned subsidiaries, or through agents and distributors who are familiar with the local market and have an excellent service network already in place. For foreign companies to successfully bid in Belgium, it is highly advisable for them to team up with one of these local partners. The Commercial Service can assist in providing a selection of qualified Belgian firms that would be suitable partners.

Belgian law defines the relationship between the American exporter(s) and the Belgian distributor(s) - including possible sub-distributors. Upon termination of a distribution agreement (either written or verbal), a Belgian distributor may have rights to compensation and damages. Belgian law will prevail even though a contract may specify otherwise.

In examining various distribution channels, please note that EU law strongly protects agents, while Belgian law protects distributors. American companies are strongly encouraged to seek competent local legal counsel in drawing up either an agency or distribution agreement. A number of U.S. legal firms have established a branch office in Belgium.

### **Domestic Production**

A few Belgian manufacturers design and manufacture subcomponents for air traffic control systems provided by U.S. and third country major system producers. A few other companies provide systems integration as well as after-sales service.

### **U.S. Market Position**

U.S. suppliers have a good reputation in Belgium but they have found their market share consistently restricted for ATC equipment. While they have succeeded in winning smaller contracts, it is difficult to overcome the preference for European suppliers. Despite these problems, U.S. suppliers have been successful in the following areas:

- Redesign of the Brussels airport
- Supply of a secondary radar system provided by Westinghouse
- Supply of a baggage screening by Invision
- Supply of Explosion detection (two InVision Technologies are installed at Brussels National airport. and four more are being procured at a cost of approximately USD 4 million)
- Supply of air traffic control software (SAIC)
- Supply of boarding bridges (50 units from Jetway Systems)

### **Best prospects**

- In the long run there are two opportunities for involvement in airport equipment. While Instrument Landing Systems (ILS) and radar equipment still offer attractive market opportunities in Belgium, over the next ten years, these systems will eventually be phased out and replaced by the Global Navigation Satellite System (GNSS). The second long-term project will be the implementation of a digital system due to the high density of traffic. Currently, over flight traffic is three times greater than Belgium bound traffic. With the current system, there are no open frequencies available in the Belgian airspace. This density of traffic results in a great deal of interference.
- In the near future there will remain some demand for category two and three ILS systems, good for 400 and 200 meters of visibility respectively.

Additional items to be procured include:

- Jet A1 hydrant pit systems
- GSE, including scissor-lifts
- 121.8 MHz radio equipment
- Radiotrunking
- ASMGCS (aircraft identification on the ground)
- Baggage handling systems
- Safety and Security equipment, including drug and explosives detection systems

## **Key contacts**

### **U. S. Department of Commerce**

American Embassy  
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The U.S. Department of Commerce has a host of services available to help U.S. manufacturers locate representatives or other types of local business partners.

### **FAA**

PSC 82 Box 002  
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FAA

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This is FAA's head office for Europe, Africa and the Middle East.

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